



Agency Training Manual

United Way Hastings & Prince Edward

For Support, please contact:

Kaitlyn Lalonde,
Director of Community Impact

klalonde@unitedwayhpe.ca

613-962-9531

Accessing e-CImpact directly from Internet

Requirements: All you need to access e-CImpact is a computer with an internet connection and current version of web browser {example: Internet Explorer, Firefox, Chrome, Safari}

Direct access to the agency site is: <https://agency.e-cimpact.com/login.aspx?org=147775>

Please bookmark the address to easily access e-CImpact at your convenience.

Accessing the Application

If you are currently funded by United Way Hastings & Prince Edward through the previous annualized allocation process, your agency login and password has been sent to you. All other organizations, please create an account. Instructions follow in this manual.

Please Note:

United Way Hastings & Prince Edward has identified specific long and short term outcomes within each pillar. Successful programs must directly address one of the long term outcomes and one of the short term outcomes and provide directly related strategies that impact the outcomes. Please review the summary document outlining these outcomes, the scoring rubric and detailed guidance letters for each pillar.

Agency Login

Now that you have accessed the Agency site, it is time to login.

For New Organizations:

Currently, the default agency username is the email address of the agency's primary contact. If you cannot remember your password please contact klalonde@unitedwayhpe.ca to have it reset.

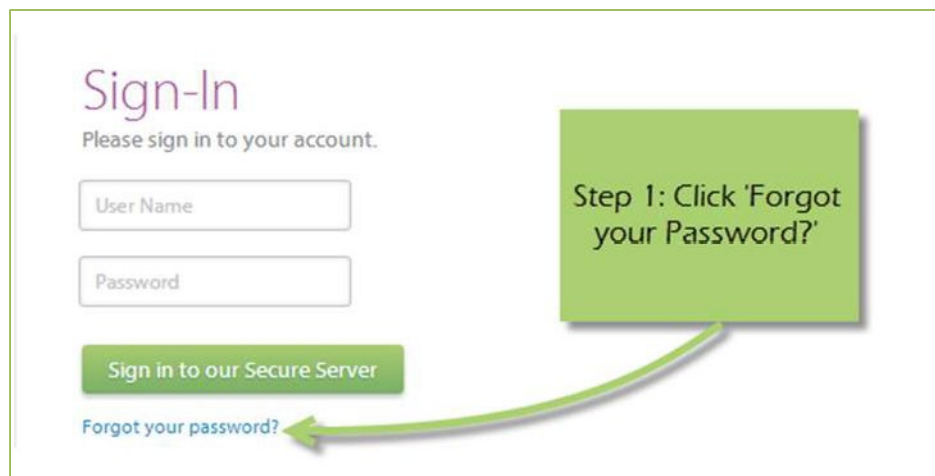
Step 1: Enter your username and password

Step 2: Click 'Sign In to our Secure Server' or use the enter key.

The screenshot shows the e-IMPACT Agency Site login page. On the left is the e-IMPACT logo with the text 'Community Impact Management' and 'AGENCY SITE'. The main section is titled 'Sign-In' with the instruction 'Please sign in to your account.' Below this are two input fields: 'User Name' and 'Password'. A green button labeled 'Sign in to our Secure Server' is positioned below the password field, with a link 'Forgot your password?' underneath it. A green callout box labeled 'Step 1: Enter Username and Password' has an arrow pointing to the 'User Name' field. Another green callout box labeled 'Step 2: Click \'Sign in to our Secure Server\'' has an arrow pointing to the 'Sign in to our Secure Server' button. Below the sign-in section is a section titled 'New to e-IMPACT?' with a large green arrow pointing right. It includes the text 'Don't have an account?' and 'Create an account to apply for available grants', followed by a green button 'Click here to create a new Account'. The footer contains security logos for 'Secured by D' and 'Secured by Thawte', a copyright notice '© 2013 e-IMPACT, Community Impact Management', and the text 'POWERED BY seabrooks'.

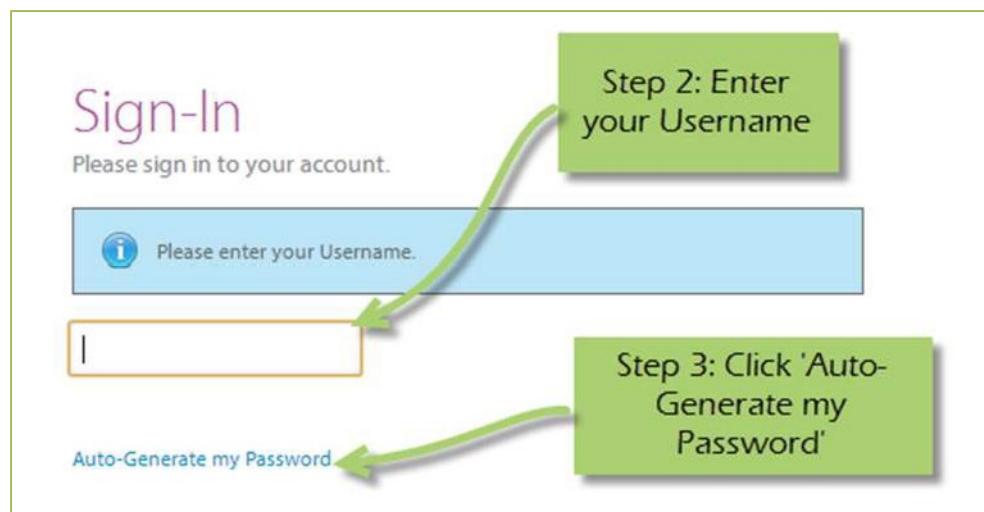
Forgot Password

Step 1: Click 'Forgot your password?' on the agency login page.



Step 2: Enter your username

Step 3: Select 'Auto-Generate my Password'



Step 4: Check your email, return to the login page and proceed to login. If you do not see the email in your inbox, be sure to check the 'junk' folder. If the email is not in either, please contact Kaitlyn Lalonde.

Registering a New Agency

If you do not yet have an agency login account, please proceed with site registration. Registration is required for all agencies.

Step 1: From the agency login page select '**Create new agency account**'

e-IMPACT™
Community Impact Management
AGENCY SITE

Sign-In
Please sign in to your account.

User Name
Password

Sign in to our Secure Server
Forgot your password?

New to e-IMPACT?
Don't have an account?
Create an account to apply for available grants.

Click here to create a new Account

Step 1: Click here to create a new account

Secured by Thawte
2013-05-28
Secured by Thawte
© 2013 e-IMPACT, Community Impact Management
POWERED BY seabrooks

Step 2: Please read all directions carefully, and then click 'Next' to continue with your registration process.

- o Tax exempt letter from the Internal Revenue Service
- o Most recent audited financial statements
- o Most recent 990

I time of at least 3 months, prior to your program or event, will all

t started please click 'Continue', then enter your Employer Identific

that your organization's information is correct.

Step 2: Read all directions, then click 'Next'

Next

Cancel and Return to Login Page

5


Community

Agency Registration

 Fields marked with an * are required fields.

Please enter information about your non-profit agency.

Agency Account Information

ERI Number:*

Agency Name:*

Additional Agency Account Information

Description:

Limit up to 750 characters (3 used).

Accredited: ☐ Yes ☒ No

Mission Statement:

Limit up to 750 characters (3 used).

Address

Address Type:*

Address Line 1:*

Address Line 2:

City:*

State:*

Postal Code:*

Email Address

Email Address Type:*

Email Address:*

Phone Number

Phone Number Type:*

Phone Number:*

Primary Contact Information

Contact Type:*


First Name:*

Last Name:*

Preferred Login



Enter your Password then retype the Password. Passwords must be between 6 and 15 characters in length and contain at least 1 digit, 1 lowercase letter, 1 uppercase letter, and 1 special character. Passwords cannot contain the following characters: ", %, @, #, ~, !, ., <, >, &, ", $, @, #, !, ', \, `, ^,], [, _, a, c, j, l, m, o, p, q, s, t, u, v, w, x, z, {, |, }, ~, , €, , ‚, ƒ, „, …, †, ‡, ˆ, ‰, Š, ‹, Œ, , Ž, , , ‘, ’, “, ”, •, –, —, ˜, ™, š, ›, œ, , ž, Ÿ, , ¡, ¢, £, ¤, ¥, ¦, §, ¨, ©, ª, «, ¬, ­, ®, ¯, °, ±, ², ³, ´, µ, ¶, ·, ¸, ¹, º, », ¼, ½, ¾, ¿, À, Á, Â, Ã, Ä, Å, Æ, Ç, È, É, Ê, Ë, Ì, Í, Î, Ï, Ð, Ñ, Ò, Ó, Ô, Õ, Ö, ×, Ø, Ù, Ú, Û, Ü, Ý, Þ, ß, à, á, â, ã, ä, å, æ, ç, è, é, ê, ë, ì, í, î, ï, ð, ñ, ò, ó, ô, õ, ö, ÷, ø, ù, ú, û, ü, ý, þ, ÿ, Ā, ā, Ă, ă, Ą, ą, Ć, ć, Ĉ, ĉ, Ċ, ċ, Č, č, Ď, ď, Đ, đ, Ē, ē, Ĕ, ĕ, Ė, ė, Ę, ę, Ě, ě, Ĝ, ĝ, Ğ, ğ, Ġ, ġ, Ģ, ģ, Ĥ, ĥ, Ħ, ħ, Ĩ, ĩ, Ī, ī, Ĭ, ĭ, Į, į, İ, ı, Ĳ, ĳ, Ĵ, ĵ, Ķ, ķ, ĸ, Ĺ, ĺ, Ļ, ļ, Ľ, ľ, Ŀ, ŀ, Ł, ł, Ń, ń, Ņ, ņ, Ň, ň, ŉ, Ŋ, ŋ, Ō, ō, Ŏ, ŏ, Ő, ő, Œ, œ, Ŕ, ŕ, Ŗ, ŗ, Ř, ř, Ś, ś, Ŝ, ŝ, Ş, ş, Š, š, Ţ, ţ, Ť, ť, Ŧ, ŧ, Ũ, ũ, Ū, ū, Ŭ, ŭ, Ů, ů, Ű, ű, Ų, ų, Ŵ, ŵ, Ŷ, ŷ, Ÿ, Ź, ź, Ż, ż, Ž, ž, ſ, ƀ, Ɓ, Ƃ, ƃ, Ƅ, ƅ, Ɔ, Ƈ, ƈ, Ɖ, Ɗ, Ƌ, ƌ, ƍ, Ǝ, Ə, Ɛ, Ƒ, ƒ, Ɠ, Ɣ, ƕ, Ɩ, Ɨ, Ƙ, ƙ, ƚ, ƛ, Ɯ, Ɲ, ƞ, Ɵ, Ơ, ơ, Ƣ, ƣ, Ƥ, ƥ, Ʀ, Ƨ, ƨ, Ʃ, ƪ, ƫ, Ƭ, ƭ, Ʈ, Ư, ư, Ʊ, Ʋ, Ƴ, ƴ, Ƶ, ƶ, Ʒ, Ƹ, ƹ, ƺ, ƻ, Ƽ, ƽ, ƾ, ƿ, ǀ, ǁ, ǂ, ǃ, Ǆ, ǅ, ǆ, Ǉ, ǈ, ǉ, Ǌ, ǋ, ǌ, Ǎ, ǎ, Ǐ, ǐ, Ǒ, ǒ, Ǔ, ǔ, Ǖ, ǖ, Ǘ, ǘ, Ǚ, ǚ, Ǜ, ǜ, ǝ, Ǟ, ǟ, Ǡ, ǡ, Ǣ, ǣ, Ǥ, ǥ, Ǧ, ǧ, Ǩ, ǩ, Ǫ, ǫ, Ǭ, ǭ, Ǯ, ǯ, ǰ, Ǳ, ǲ, ǳ, Ǵ, ǵ, Ƕ, Ƿ, Ǹ, ǹ, Ǻ, ǻ, Ǽ, ǽ, Ǿ, ǿ, Ȁ, ȁ, Ȃ, ȃ, Ȅ, ȅ, Ȇ, ȇ, Ȉ, ȉ, Ȋ, ȋ, Ȍ, ȍ, Ȏ, ȏ, Ȑ, ȑ, Ȓ, ȓ, &

Step4: Select a grant application you would like to apply for, and then continue to the next page.

 **United Way**
Hastings &
Prince Edward

Investment Opportunities

Please review the list of currently available Investment Opportunities at United Way of Quinte below. Select an investment to complete an application. Some investments may require pre-qualification information be provided.

-  **1) Community Impact Fund Request for Investment**
Community Impact Fund - Single and multi year program funding
-  **1) Innovation Grant**
Innovation Fund: Funds used to support Collaboration or Organizational Capacity initiatives.


[Previous](#) [Next](#)

[Cancel and Return to Login Page](#)

e-ClImpact™ Community Impact Management
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Step 5: Please answer all qualification questions, and proceed to the next page.

If your agency passes the initial qualification questions, you will then move on to confirm your registration. In the event your agency does not qualify, you will be provided information on who to contact should you have any questions.

 **United Way**
Hastings &
Prince Edward

Pre-Qualifications

Fields marked with an * are required fields.

Thank you for applying for United Way of Quinte funding, please read the following eligibility criteria carefully. To be eligible to submit you must meet all of the following criteria. Failure to respond "Yes" to all questions will make you ineligible for funding and will prevent you from continuing with the application process. If you have questions please contact the United Way of Quinte at 613-962-9531.

To be eligible to submit you must meet the following eligibility criteria.

- 1.) This organization aligns with United Way of Quinte Community Impact Strategy. *
- 2.) This organization is a qualified donee under Canada Revenue Agency. *
- 3.) This organization provides services to residents within Hastings County and/or Prince Edward County. *
- 4.) This organization actively plans, delivers and evaluates its programs and services. *
- 5.) This organization maintains accurate financial and accounting records, and uses budgetary controls. *

Step 5: Answer Qualification Questions, then click 'Next'

Step 6: Review all agency information entered, and then click '**Complete Registration**'

Please Review the information below for accuracy.

EIN: 567774568
Agency Name: 123 Test Agency

Additional Agency Account Information Summary

Description:

Accredited: ☐ Yes ☒ No

Mission Statement:

Agency Information Summary

Address: 123 Main Street
City, Illinois
45654
(Mailing)

Email Address: info@email.com (Main)

Phone Number: (555) 666-3333 (Fax)

Primary Contact Information Summary

Contact Name: me me (Executive Director)

Preferred Login

Username: 123agency


Password: *****


Request Summary

The Youth Philanthropy Project

The Youth Philanthropy Project is transitioning to a formal partnership between The Community Foundation and HandsOn Project. The purpose of this partnership is to further enhance the quality of the experience for participants and to further expand our reach to youth throughout the region.

Step 6: Review your agencies information, then 'Complete Registration'



 [Cancel and Return to Login Page](#)

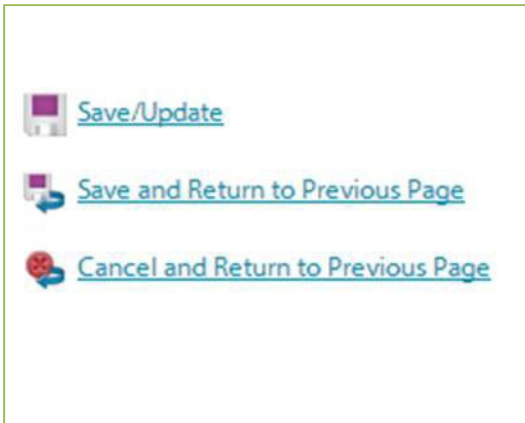
Once your registration is completed you will be able to print your confirmation page. You will also receive a confirmation email. If you have met all pre-qualification terms your registration as an agency through e-CImpact will automatically approved and you can proceed to completing the application.

Note: You can also access the e-CImpact Agency Training Manual by going to the resource center located in the lower left side of the [agency homepage](#).



Common Navigation

The navigation links in e-CImpact are consistent throughout the site.



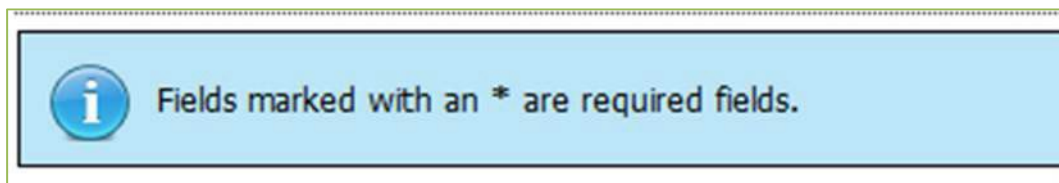
Save/Update: Refreshes the page while saving any changes made to your data. Note: any changes won't display unless you save/update.

Save and Return to Previous Page: Returns you to the page last visited while saving any changes made to your data.

Cancel and Return to Previous Page: Will return you to the previous page and will NOT save any changes made to your data.



Changing the Font Size: Located in the upper right hand corner of the agency site, click the large 'A' to increase the font size. Click the smaller 'A' to decrease the font size.



Agency Site Home Page

From the home page you will be able to access all parts of the agency site. There are four basic sections:

1. Account Management
2. Agency Information
3. News, Events, and Calendars
4. Applications and Resource Center

The screenshot shows the e-IMPACT Agency Site Home Page. At the top, a navigation bar includes the user's name (Rose Ogihara), links for [Change Password](#), [User Profile](#), and [Signout](#), along with a session time remaining of 16:27. The page features the e-IMPACT logo and a sidebar with links for Home, Agency Profile, Additional Info, Users, Mission Statement, and Project Profiles. The main content area is divided into several sections: New Meeting (Application Training - Agency Site, Thursday, February 28, 2013 @ 7:45 AM - 10:45 PM, Please RSVP for this Meeting!), Calendar (February 2013), Today's Schedule (Thursday, February 14, 2013), Schedule for February, Our Work through Initiatives (African American Initiative Update, Immunization Initiative Update), and a Feedback link. Four green callout boxes with arrows point to specific areas: 1. Account Management points to the top right; 2. Agency Information points to the top center; 3. News, Events, and Calendars points to the New Meeting and Calendar sections; 4. Application and Resource Center points to the Request Grant Application and Resource Center sections.

Hello, **Rose Ogihara** | [Change Password](#) | [User Profile](#) | [Signout](#) (Session time remaining: 16:27) | Font Size: A **A**

e-IMPACT | Community Impact Management

1. Account Management

2. Agency Information

3. News, Events, and Calendars

4. Application and Resource Center

Family Service Agency

- [Home](#)
- [Agency Profile](#)
- [Additional Info](#)
- [Users](#)
- [Mission Statement](#)
- [Project Profiles](#)

Schedule

- [Current Meeting \(1\)](#)
- [Meeting Archive \(1\)](#)
- [On-Site Visits Archive \(1\)](#)

[Request Grant Application](#)

Resource Center

- [Agency Reports \(1\)](#)
- [e-IMPACT Agency Training Manual \(1\)](#)

New Meeting

Application Training - Agency Site

Thursday, February 28, 2013 @ 7:45 AM - 10:45 PM

Please **RSVP** for this Meeting!

Calendar

February 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9

Today's Schedule: Thursday, February 14, 2013

- None Scheduled

Schedule for February

- None Scheduled

Our Work through Initiatives

African American Initiative Update

This exciting program supports community-wide efforts to nurture young, at-risk African American boys as they develop into successful young men.

Immunization Initiative Update

This nationally-recognized program is getting kids in underserved communities the immunizations they need to stay healthy.

FEEDBACK

[Account Management](#)

[Change Password](#) | [User Profile](#) | [Signout](#) (Session time remaining: 17:44)

[Change Password](#)

Step 1: To change your password, select 'Change Password'

Step 2: Enter the old password

Step 3: Then enter the new password two times.

Password Rules:

- Must be between 6 and 15 characters.
- Must contain at least 1 character from 2 of the groups of alpha, numeric, or special characters.
- Characters NOT accepted are: ", % or any white-space.

[User Profile](#)


The User Profile area is where you are able to add, edit, or delete any of your information including: primary contact, basic information, email addresses, phone numbers, and mailing addresses. Users may also choose to be 'Included in all Emails'.

Primary Contact: There can only be one primary contact per agency. This can be set by selecting the check box 'Primary?'. The primary contact is automatically included in all emails and cannot be deactivated unless a new primary contact is selected.

Include in all Emails: This allows users to receive all emails sent through e-CImpact. Users who do not select 'Include in all Emails?' will only receive emails that appropriate for their position.

Active: Make sure your account is 'Active'. Once a user is deactivated you will need to contact Kaitlyn Lalonde, klalonde@unitedwayhpe.ca to reactivate the user account.

Contacts

 Fields marked with an * are required fields.

☒ Primary?

☒ Include in all Emails?

☒ Active?

Type:*

Executive Director

Prefix:

First Name:*

Alexis

Middle Initial:


Last Name:*


Johnson


Suffix:

Company:

Job Title:

 [Save/Update](#)

 [Save and Return to Previous Page](#)

 [Cancel and Return to Previous Page](#)

Enter any necessary information, and then click 'Save/Update'.

Signout

Users should 'Signout' of e-CImpact to ensure the security of their data. Once signed out of e-CImpact, press the 'X' in the upper right hand corner of your browser to close the window.

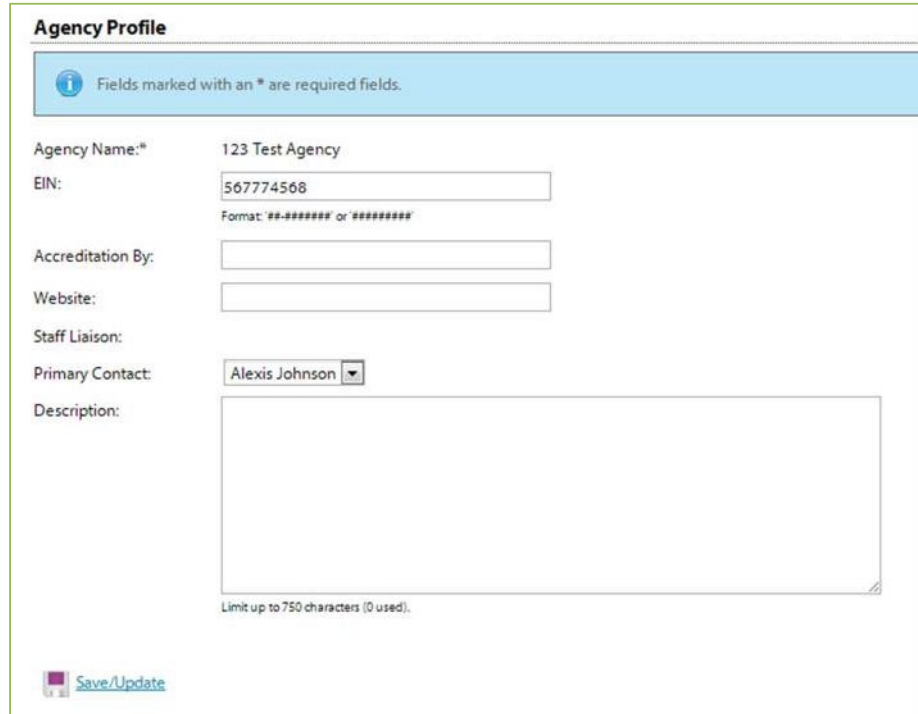
[Agency Information](#)

The Agency Information section is where account information, contacts, statements (mission / vision / agency) and program information is housed. From this section you will be able to update your address(es), or contact information.



[Agency Profile](#)

The profile page is where all agency specific information is housed and can be updated. This includes the basic information - agency name, staff contact, primary contact, website, etc.

A screenshot of the 'Agency Profile' form. The form has a title bar 'Agency Profile' and a light blue banner with an information icon and the text 'Fields marked with an * are required fields.' The form contains several fields: 'Agency Name:*' with the value '123 Test Agency'; 'EIN:' with the value '567774568' and a format hint 'Format: ##-#### or #####'; 'Accreditation By:' with an empty text box; 'Website:' with an empty text box; 'Staff Liaison:' with an empty text box; 'Primary Contact:' with a dropdown menu showing 'Alexis Johnson'; and 'Description:' with a large text area. At the bottom right of the description area, it says 'Limit up to 750 characters (0 used)'. At the bottom left of the form, there is a 'Save/Update' button with a small icon.

Account name(s), address(es), phone number(s) and email address(es)

You may also add, edit or delete account names, address, phone numbers and email addresses. Agencies are able to have multiple records for each section.

Account Names

Type	Account Name	Active?	Actions
+ Add New Account Name			

Addresses

Type	Address	Primary?	Active?	Actions
Mailing	123 Main Street, City, IL 45654, U.S.A.	Yes	Yes	Edit Delete
+ Add New Address				

Phone Numbers

Type	Phone Number	Primary?	Active?	Actions
Fax	(555) 666-3333	Yes	Yes	Edit Delete
+ Add New Phone Number				

Email Addresses

Type	Email Address	Primary?	Active?	Actions
Main	info@email.com	Yes	Yes	Edit Delete
+ Add New Email Address				

'Account Names' is a place for any other names for your agency, or if your agency name is abbreviated you may place the legal name here.

Agency Contacts

- ☐ Confidential?
- ☐ Primary?
- ☒ Active?

When adding a new record, or updating existing records, be sure to select 'Active' appropriately.

'Primary' can only be selected for one record.

To view all agency contacts - click 'Contacts' from the agency information section on the homepage.



From this area you will be able to see anyone who is currently listed as a contact at your agency, as well as add, edit, deactivate or delete an agency contact.

Contacts					
Name	Contacts Type	Company	Primary?	Login	Actions
Alexis Johnson	Exec		Yes		Edit
<div>Click here to Add New contacts</div> <div>Click here to 'Edit' existing contacts</div>					
Add New					


The agency contact profile page is similar to the user profile and contains the same information.

- Name and preference
- Email addresses
- Phone Numbers
- Addresses


Request a Login: Once a new contact has been created, you are able to request a login for this user.

Step 1: Click 'Request a Login'

Contacts					
Name	Contacts Type	Company	Primary?	Login	Actions
Alexis Johnson	Executive Director		Yes	123agency	Edit
Rose Ogihara	Grant Writer			Request a Login	Edit Delete

 [Add New](#)

Step 1: Request a Login



Step 2: Enter username and password.

*A contacts email address is commonly used as the username due to email addresses being unique.

Request a Login Account for Rose Ogihara

Enter a password and then retype the password to ensure that it has been entered correctly. Your new password must be between 6 and 15 characters in length and contain at least 1 character from 2 of the groups of alpha, numeric, or special characters. Your Password may not contain the following characters: ", %, or any white-space.

Password Examples:

- abcdefg2 (valid, contains letters and numbers)
- pa\$\$word (valid, contains letters and numbers)
- 1234567# (valid, contains letters and a special character)
- abcdefgh (invalid, contains only letters)
- abc23 (invalid, less than 6 characters)


Contact Type: Grant Writer


Contact Name: Rose Ogihara

Username:*

Password:*

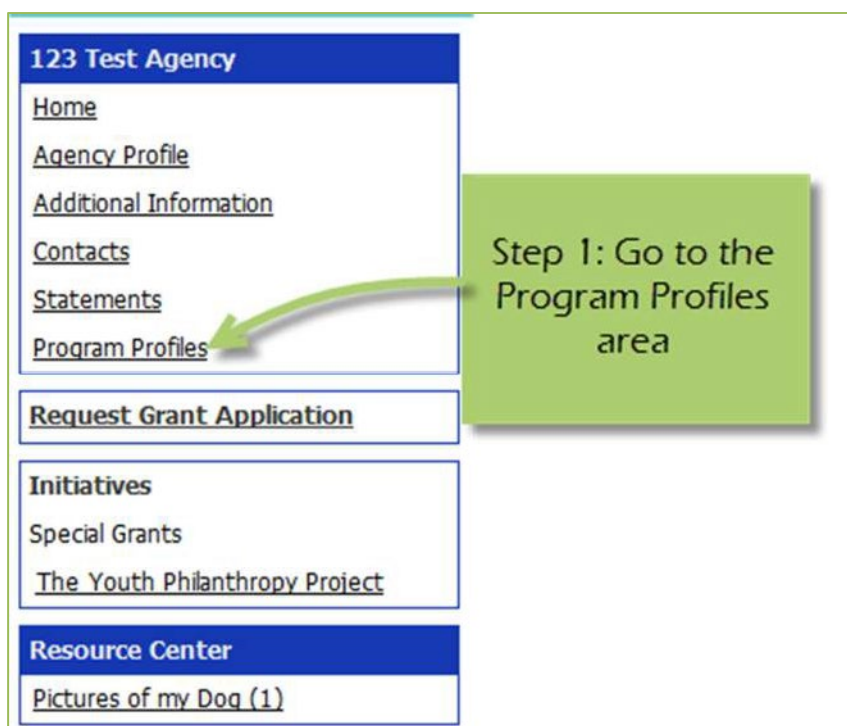
Confirm Password:*

 [Save/Update](#)

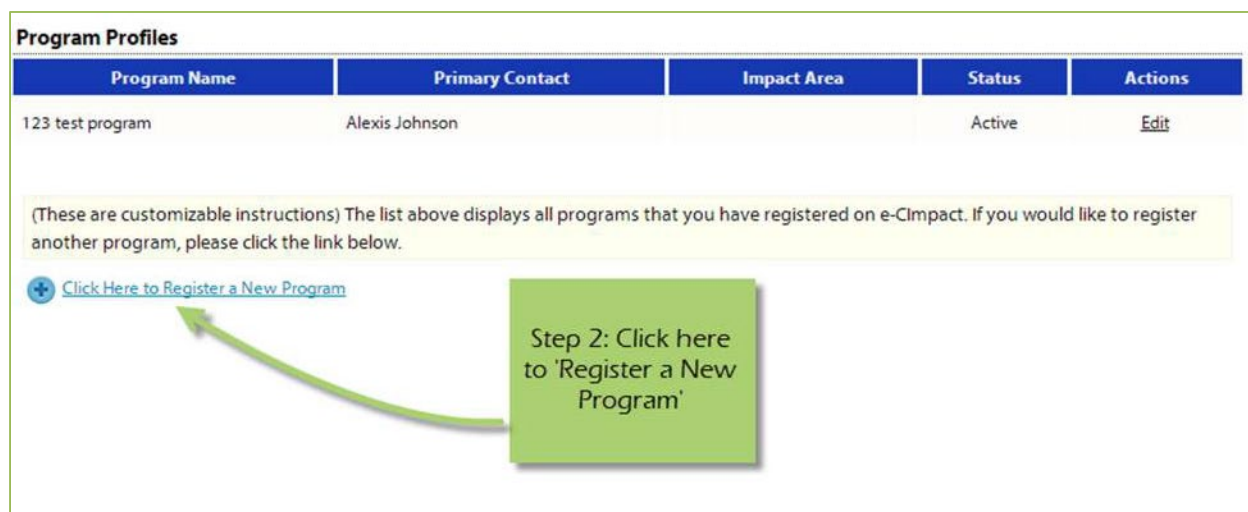
 [Return To Previous Page](#)

[Registering a New Program](#)

Step 1: Go to the programs area by selecting 'Program Profiles'



Step 2: Select 'Click Here to Register a New Program'



Step 3: Enter all required program information, and then select 'Save / Complete Registration'

Program Registration

Enter the program / project name and basic information below.

Program / Project

Program Name:*
Limit up to 150 characters (0 used).

Primary Contact:

[Save/Complete Registration](#) [Cancel and Return to Previous Page](#)

Step 3: Enter required information, then 'Save / Complete Registration'

After selecting 'Save/Complete Registration' you will be directed to the program profiles page, here you will see a validation message stating that you have successfully registered your program.

Updating Program Information

Step 1: To edit a program, go to the program profiles area.

Step 2: Select 'Edit' next to the desired program.

Program Profiles

Program Name	Primary Contact	Impact Area	Status	Actions
123 test program	Alexis Johnson		Active	Edit

(These are customizable instructions) The list above displays all programs that you have registered on e-CImpact. If you would like to register another program, please click the link below.

[Click Here to Register a New Program](#)

Step 2: Select 'Edit'

From here you will be able to update information as needed.

Calendar

The calendar area will display any events or site visits you have RSVP's for. Some news items will display here as well.

Please note that the items listed in the calendar area are specific to the selected month.

Calendar

≤

May 2013

≥

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today's Schedule: Tuesday, May 21, 2013

- None Scheduled

Schedule for May

- [\(5/31/2013\)](#)

[2013 Community Impact Application](#)

If you wish to view items from another month use the arrows to switch months.

Calendar

≤

April 2013

≥

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Today's Schedule: Tuesday, May 21, 2013

- None Scheduled

Schedule for April

- None Scheduled

Use the arrows to switch months

Site Visits

When offered, you are able to select dates available for volunteers to come and visit your agency site.

Step 1: To access the site visit area select 'Current Site Visit'

Step 2: Select 'Reserve Time Slot' for the agency or program.

The screenshot shows the 'Schedule > Current Site Visit' page. On the left is a sidebar menu for '123 Test Agency' with links: Home, Agency Profile, Contacts, Program Profiles, Schedule, Current Site Visit (2), Request Grant Application, Initiatives, Special Grants, The Youth Philanthropy Project, Resource Center, and Pictures of my Dog (1). The main content area has a table with columns: Site Visit, Staff Liaison, # of Volunteer(s), and Actions. The table lists '2013 Health Site Visits' and '2013 Education Site Visits', both with 0 volunteers and a 'Reserve Time Slot' link. A green box with an arrow points to 'Current Site Visit (2)' in the sidebar, labeled 'Step 1: Click on \'Current Site Visit\''. Another green box with an arrow points to the 'Reserve Time Slot' link, labeled 'Step 2: \'Reserve Time Slot\''.

Site Visit	Staff Liaison	# of Volunteer(s)	Actions
2013 Health Site Visits		0	Reserve Time Slot
2013 Education Site Visits		0	Reserve Time Slot

Step 3: Choose the date and address desired.

Step 4: 'Save/Update' or 'Save and Return to Previous Page'

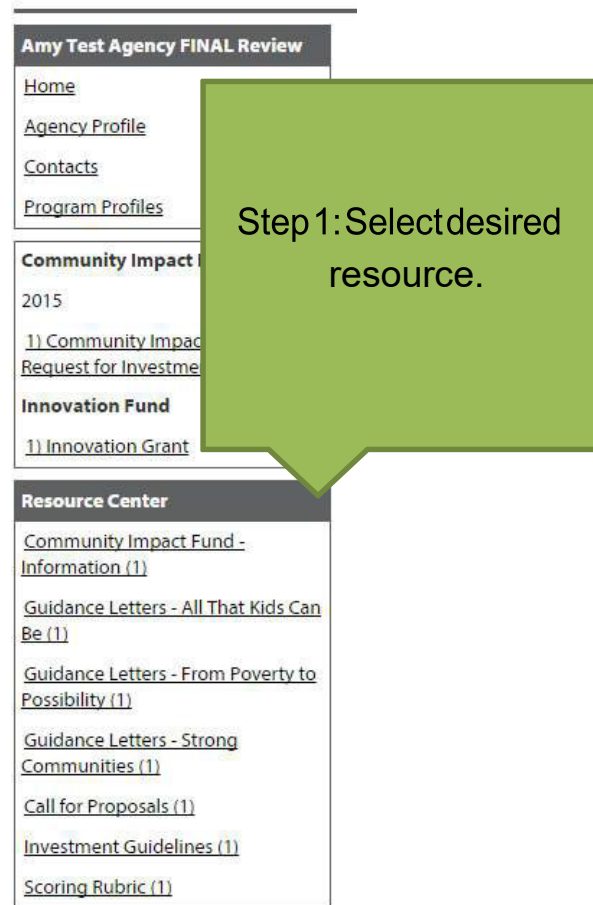
The screenshot shows the 'Schedule > Current Site Visit > Reserve Time Slot' form. A blue banner at the top states: 'Fields marked with an * are required fields.' The form fields are: Site Visit (2013 Education Site Visits), Date:* (4/25/2013 9:00 AM), Address:* (1248 Any Sreet, Anytown, IL 98277, U.S.A.), Staff Liaison (Kate Attea), and # of Volunteer(s) (0). At the bottom are four buttons: Save/Update, Save and Return to Previous Page, Cancel and Return to Previous Page, and Cancel this Site Visit Sign-up. A green box with an arrow points to the Date and Address fields, labeled 'Step 3: Select the date and address'. Another green box with an arrow points to the 'Save/Update' button, labeled 'Step 4: Save'.

[Resource Center](#)

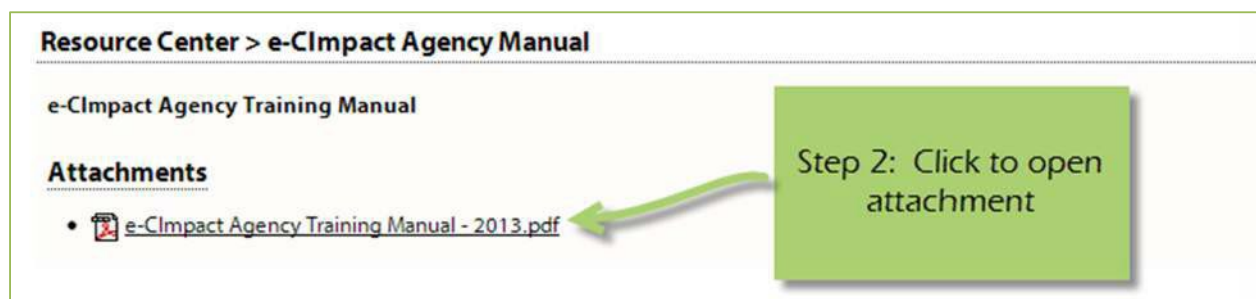
The agency resource center is where you will be able to find any documents you may need to reference from United Way Hastings & Prince Edward. The resource center is located in the lower half of the left hand navigation.

[Accessing Resources](#)

Step 1: Select desired resource item



Step 2: Click on the attachment link to open



[The Basics of your Applications / Grant Process](#)

Accessing Application / Grant Process

Step 1: Choose the application or grant process from the list located in the left hand navigation.

Hello, Amy Watkins | [Change Password](#) | [User Profile](#) | [Logout](#) (session time remaining: 1:40:46)

Amy Test Agency FINAL Review
[Home](#)
[Agency Profile](#)
[Contacts](#)
[Program Profiles](#)

Community Impact Fund
2015
[1\) Community Impact Fund Request for Investment](#)

Innovation Fund
[1\) Innovation Grant](#)

Resource Center
[Community Impact Fund - Information \(1\)](#)
[Guidance Letters - All That Kids Can Be \(1\)](#)
[Guidance Letters - From Poverty to Possibility \(1\)](#)
[Guidance Letters - Strong Communities \(1\)](#)
[Call for Proposals \(1\)](#)
[Investment Guidelines \(1\)](#)
[Scoring Rubric \(1\)](#)

Innovation Fund
2015 - 1) Innovation Grant
Amy Test Agency FINAL Review

Innovation Fund: Funds used to support Collaboration or Organizational Capacity initiatives.

Step 1: Click the link for the application or grant you would like to apply for.

1) Innovation Grant Status

Not Started

In Progress

Item (* indicates Required Item)	Last Updated
Amy Test Agency FINAL Review	03/09/2015 1:42 PM (CST)
Agency Information*	Amy Watkins 03/09/2015 1:42 PM (CST)
Capacity Grant	

Form Status

This page works much like a check list. You are able to easily see how much of your application you have submitted.

The screenshot shows a web interface for tracking application status. At the top, a progress bar has four segments: 'Not Started' (highlighted in red), 'In Progress' (grey), 'Ready To Submit' (grey), and 'Submitted' (grey). Below this is a table with four columns: 'Item (* indicates Required Item)', 'Last Updated', 'Status', and 'Action'. The table lists several items, all with a 'Not Started' status. A green callout box with two arrows points to the 'Not Started' segment of the progress bar and the 'Status' column of the table, containing the text: 'The top bar is the Overall Application status.' and 'The Status column is for the individual forms.'

Item (* indicates Required Item)	Last Updated	Status	Action
Children's Home Foundation		Not Started	
Agency Information*		Not Started	
Alternative Education Program		Not Started	<input checked="" type="checkbox"/> Include?
Program Information*		Not Started	
Demo Logic Model Navigation		Not Started	
Program Budget*		Not Started	
Program Demographics*		Not Started	
Copy of Program Logic Model		Not Started	

Not Started: When the application or form is in not started status, it means that no data has been entered yet.

In Progress: If your form is set to in progress, then the form has been started, and saved. The form has not been marked completed. The top bar will remain at 'In Progress' until all forms are marked completed.

Ready to Submit: Once all forms are marked completed, your top bar should move to 'Ready to Submit'. At this stage you should review any information entered, then move on to submit your application.

Submitted: When an application is in submitted status, you will no longer be able to make changes to the information on the forms. If you submit, and find you need to make an edit, you should contact Kaitlyn Lalonde before the annual application deadline to make any adjustments.

Entering Information

To begin filling out your application click on the desired form:

Request for Investment Phase 1 Status

Not Started

Item (* indicates Required Item)	Last Updated
Amy Test Agency FINAL Review	02/
Agency Information*	Am 02/
Fund Raising Events Primary*	Am 02/
Fund Raising Events 2	
Fund Raising Events 3	
Fund Raising Events 4	
Fund Raising Events 5	
Good Backpack Program	
Program Information*	
Program Details*	
UWQ CI Strategy Alignment*	

Save Options

After entering information on your forms, you have multiple save options.



Save My Work / Save My Work and Return to Previous Page: These options are for when you need to save, or move on to something else, and are not finished entering information.

Save My Work and Mark as Completed: This option is for when you have entered and reviewed your information and are ready to turn it in.

Switching Forms

There are two ways to switch forms within an application:

First: When you are finished with one form, click on 'Save My Work and Return to Previous Page', and then select the next form.



Second: You can use the 'Switch Forms' option, located in the upper right hand corner.

Step 1: Click 'Switch Forms' to view the list of available forms.



Grant Process

Other Grant Process - 2013 Application

Children's Home Foundation

Status: Not Started

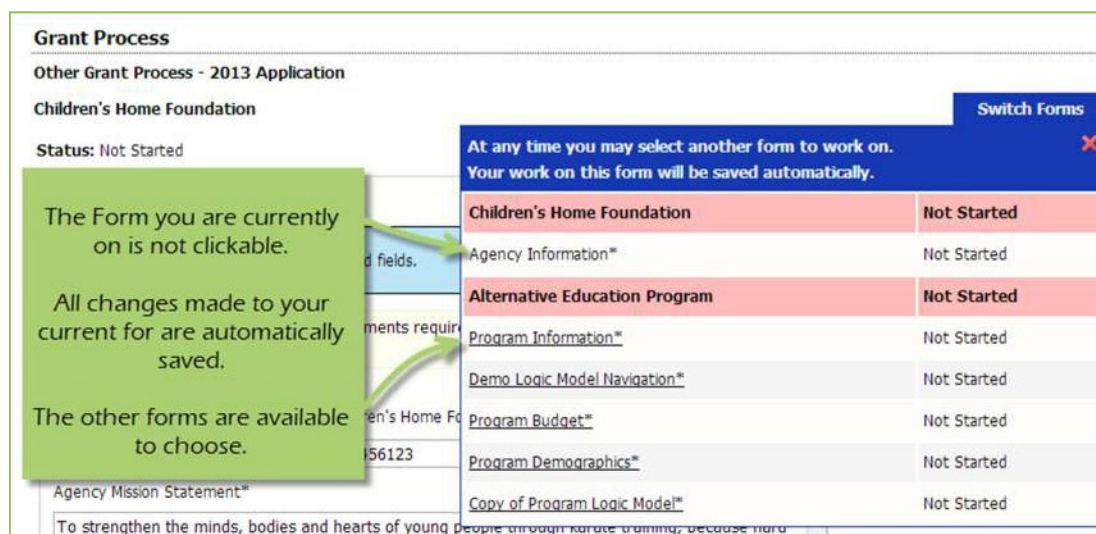
Agency Information

Fields marked with an * are required fields.

***NOTE: Remember to upload the documents required as set forth in the Financial Checklist section below in the space provided on the Agency Form List/Summary page.

Switch Forms

Step 2: Click on the form you would like to move to.



Grant Process

Other Grant Process - 2013 Application

Children's Home Foundation

Status: Not Started

The Form you are currently on is not clickable.

All changes made to your current form are automatically saved.

The other forms are available to choose.

Switch Forms

At any time you may select another form to work on. Your work on this form will be saved automatically.

Form Name	Status
Children's Home Foundation	Not Started
Agency Information*	Not Started
Alternative Education Program	Not Started
Program Information*	Not Started
Demo Logic Model Navigation*	Not Started
Program Budget*	Not Started
Program Demographics*	Not Started
Copy of Program Logic Model*	Not Started

Attachments

Uploading Attachments

Excepted file types for uploading documents:

- Accepted file types: pdf, doc, docx, ppt, pptx, xls, xlsx, gif, jpg, jpeg, bmp, tif, rtf, and txt.
- Combined maximum file size is 8MB.

Step 1: Open 'please upload and submit these documents'

Community Impact Fund
2015 - 2) Request for Investment Phase 2

****Test Agency Name****

Request for Investment Phase 2 Status **Printer Friendly**

Not Started **In Progress** Ready To Submit Submitted

Item (* indicates Required Item)	Last Updated	Status	Action
Test Agency Name	01/09/2015 11:11 AM (CST)	In Progress	
Agency Information*	Test Agency Contact 01/09/2015 11:03 AM (CST)	In Progress	
Agency Reserves Questionnaire Part 1*			
Agency Reserves Questionnaire Part 2*			
Agency Consolidated Financial Information*			
Agency Surplus / Deficit*			
Please upload and submit these documents		Not Started	
Test Program Name - All that kids can be		Not Started	<input checked="" type="checkbox"/> Include?

The Attachments form displays the same as other forms.

Step 2: Once you have confirmed your document meets the upload requirements, click 'Choose File'.

est Agency Name** - Google Chrome

...t.com/home.aspx?token=1&InvestmentID=7428&FormInvestmentApplicationID=133006

[Change Password](#) | [User Profile](#) | [Signout](#) (Session time remaining: 1:57:44) Font Size:

Community Impact Fund

2015 - 2) Request for Investment Phase 2

****Test Agency Name**** **Switch Forms**

- Accepted file types: pdf, doc, docx, ppt, pptx, xls,xlsx, gif, jpg, jpeg, bmp, tif, rtf, and txt.
- Combined maximum file size is 8MB.

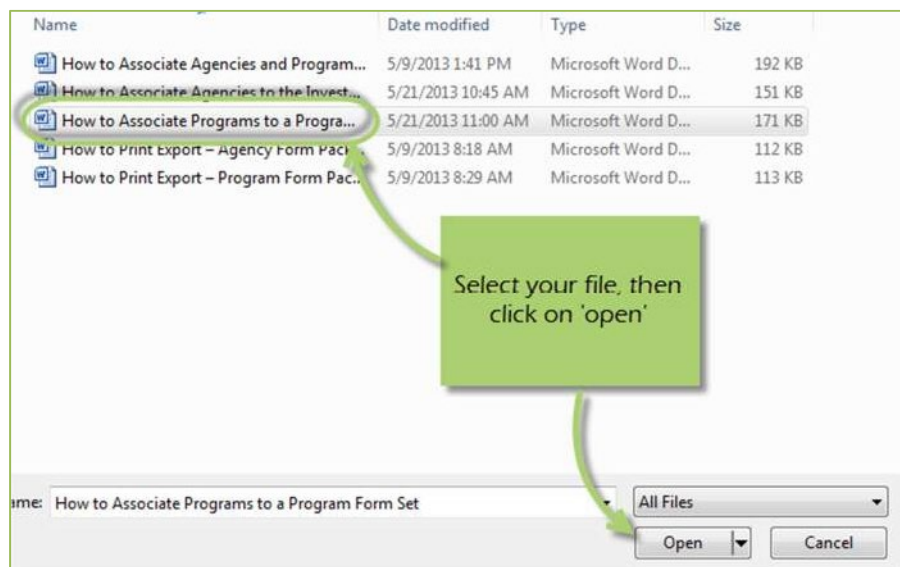
*Items marked with an * are required.*

Please upload and submit these documents

Description	File	Last Modified	Action
Board of Director listing*	<input type="button" value="Choose File"/> No file chosen		
Budget Notes - Template 1 A* Please download a copy of template 1A from the resource center and upload a completed copy here. Thank you.	<input type="button" value="Choose File"/> No file chosen		
Current Annual Report* If you do not have a Current Annual Report, please upload a document with an explanation of why. Thank you.	<input type="button" value="Choose File"/> No file chosen		
Current Audited financial statements*	<input type="button" value="Choose File"/> No file chosen		
Current Bylaws*	<input type="button" value="Choose File"/> No file chosen		
Designated Reserve Conditions If you have Designated Reserves, please upload a document specifying conditions under which expenditures would be allowed.	<input type="button" value="Choose File"/> No file chosen		

Click here to choose file.

Step 3: Browse your computer, and select the desired document.



Step 4: 'Save/Upload Attachment(s)'

Required Documents

Description	File	Last Modified	Action
501c3* Please upload your current 501c3. Thank you	Choose File		
Save/Upload Attachment(s)			
Return to Overview Page			

Click here to 'Save/Upload Attachment'

Viewing Attachments

Step 1: Click on the document name to download and open it.

Required Documents

Description	File	Last Modified	Action
501c3 Please upload your current 501c3. Thank you	e-CImpact Agency Training Manual - 2013.pdf	Deja Vu 5/28/2013 2:44 PM	Delete

Click on document to 'View' it

Deleting Attachments

In the event the wrong document was uploaded you may need to delete your attachment.

Step 1: Open 'please upload and submit these documents'

Application Status

Not Started In Progress Submitted

Item (* indicates Required Item) **Last Updated** **Action**

Children's Home Foundation			Download
Agency Information*			
Required Documents		Not Started	
After School Program		Not Started	<input checked="" type="checkbox"/> Include? Download

The Attachments form displays the same as other forms.

Step 2: Select 'Delete' next to the desired document

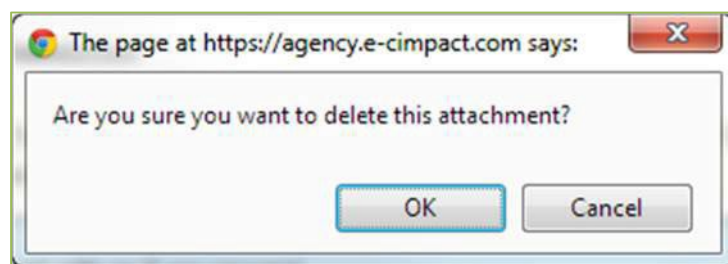


The screenshot shows a web interface titled "Required Documents". It contains a table with the following columns: "Description", "File", "Last Modified", and "Action". The first row of the table has the following data: "501c3*" in the Description column, "e-CImpact Agency Train" in the File column, "Deja Vu" in the Last Modified column, and "5/28/2013 2:44 PM" in the Last Modified column. The Action column for this row contains a "Delete" link. A green callout box with the text "Click here to 'Delete' your attachment" has an arrow pointing to the "Delete" link. Below the table, there are two links: "Save/Upload Attachment(s)" and "Return to Overview Page".

Description	File	Last Modified	Action
501c3* Please upload your current 501c3. Thank you	e-CImpact Agency Train	Deja Vu 5/28/2013 2:44 PM	Delete

[Save/Upload Attachment\(s\)](#)
[Return to Overview Page](#)

Step3: Confirm you would like to delete this attachment



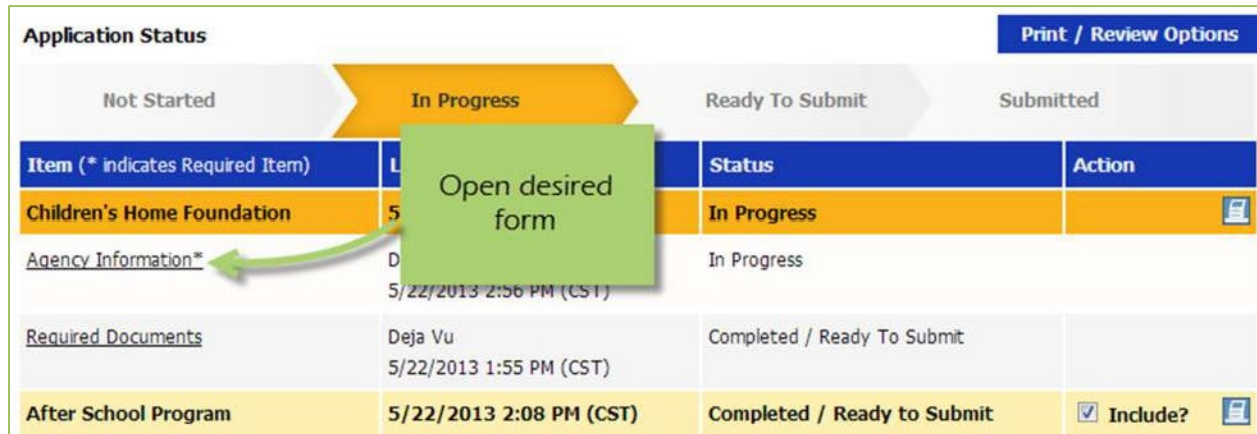
You are now able to upload the correct attachment. Repeat uploading attachments steps.

Submitting Application

Mark Forms 'Complete / Ready to Submit'

In order to submit your application, you must mark ALL forms 'Completed / Ready to Submit'

Step 1: Open form



The screenshot shows the 'Application Status' page with a progress bar at the top indicating 'In Progress'. Below the progress bar is a table with columns: Item (* indicates Required Item), Status, and Action. The table lists three items: 'Children's Home Foundation' (In Progress), 'Agency Information*' (In Progress), and 'Required Documents' (Completed / Ready To Submit). A green callout box with the text 'Open desired form' points to the 'Agency Information*' row. The 'After School Program' row is also visible, marked as 'Completed / Ready to Submit'.

Item (* indicates Required Item)	Status	Action
Children's Home Foundation	In Progress	
Agency Information*	In Progress	
Required Documents	Completed / Ready To Submit	
After School Program	Completed / Ready to Submit	<input checked="" type="checkbox"/> Include?

Step 2: Review information, then 'Save My Work and Mark as Completed'



The screenshot shows a menu with four options: 'Save My Work', 'Save My Work And Return To Previous Page', 'Save My Work and Mark as Completed', and 'Return To Overview Page'. A green callout box with the text 'After review - Click here to mark form completed' points to the 'Save My Work and Mark as Completed' option.

- [Save My Work](#)
- [Save My Work And Return To Previous Page](#)
- [Save My Work and Mark as Completed](#)
- [Return To Overview Page](#)

Complete these steps for each form until you have completed the entire application.

Submit!


Once all forms are 'Completed / Ready to Submit', the 'submit this application now' option will appear at the top of the page.

Assign Programs to this Request for Investment Phase 1

Select a Program:

➔ [Assign Selected Program to this Request for Investment Phase 1](#)

⊕ [Create a new Program and Assign it to this Request for Investment Phase 1](#)

 Your Request for Investment Phase 1 is now Ready To Submit!

Request for Investment Phase 1 Submission Details

Approved at the Board of Directors meeting on*:

Executive Director*:

Board President*:

Board Treasurer*:

Send Submission Confirmation Email To*:

Submitted By: Amy Watkins on 02/09/2015 at 1:34 PM (CST)

[Submit This Request for Investment Phase 1 Now!](#)

Request for Investment Phase 1 Status

Not Started	In Progress	Ready To Submit	Submitted
Item (* indicates Required Item)	Last Updated	Status	
Amy Test Agency FINAL Review	02/09/2015 1:34 PM (CST)	Submitted	
Agency Information*	Amy Watkins 02/09/2015 9:29 AM (CST)	Submitted	
Fund Raising Events Primary*	Amy Watkins 02/09/2015 12:43 PM (CST)	Submitted	

Step 1: Confirm the email address to send the confirmation message.

This screenshot shows a web form for submitting a request. It includes several input fields for approval details and a confirmation email address. A green callout box points to the email field with the instruction: 'Confirm emailaddress, make changes if necessary.'

Approved at the Board of Directors meeting on*: 10/09/2015

Executive Director*: Judi Gilbert

Board President*: Danny Nickle

Board Treasurer*: JaneMcCulluagh

Send Submission Confirmation Email To*: awatkins@unitedwayofquinte.ca

Submitted By: Amy Watkins on 02/09/2015 at 1:34 PM (CST)

Submit This Request for Investment Phase 1 Now!

Step 2: Select 'Submit This Application Now!'

This screenshot shows the same web form as in Step 1, but with a green callout box pointing to the 'Submit This Request for Investment Phase 1 Now!' button. The callout box contains the instruction: 'Select 'Submit This Request for Investment Phase 1 Now!''

Send Submission Confirmation Email To*: awatkins@unitedwayofquinte.ca


Submitted By: Amy Watkins on 02/09/2015 at 1:34 PM (CST)

Submit This Request for Investment Phase 1 Now!

Now that you have successfully submitted your application, you will see everything is now in submitted status.

2015 - 1) Community Impact Fund Request for Investment
Amy Test Agency FINAL Review

Community Impact Fund - Single and multi year program funding



✓ You have successfully submitted this Request for Investment Phase 1.

Request for Investment Phase 1 Submission Details

Approved at the Board of Directors meeting on: 10/09/2015

Executive Director: Judi Gilbert

Board President: Danny Nickle

Board Treasurer: Jane McCullough

Send Submission Confirmation Email To:* awatkins@unitedwayofquinte.ca

Submitted By: Amy Watkins on 09/09/2015 at 2:16 PM (CST)

Request for Investment Phase 1 Status Printer Friendly

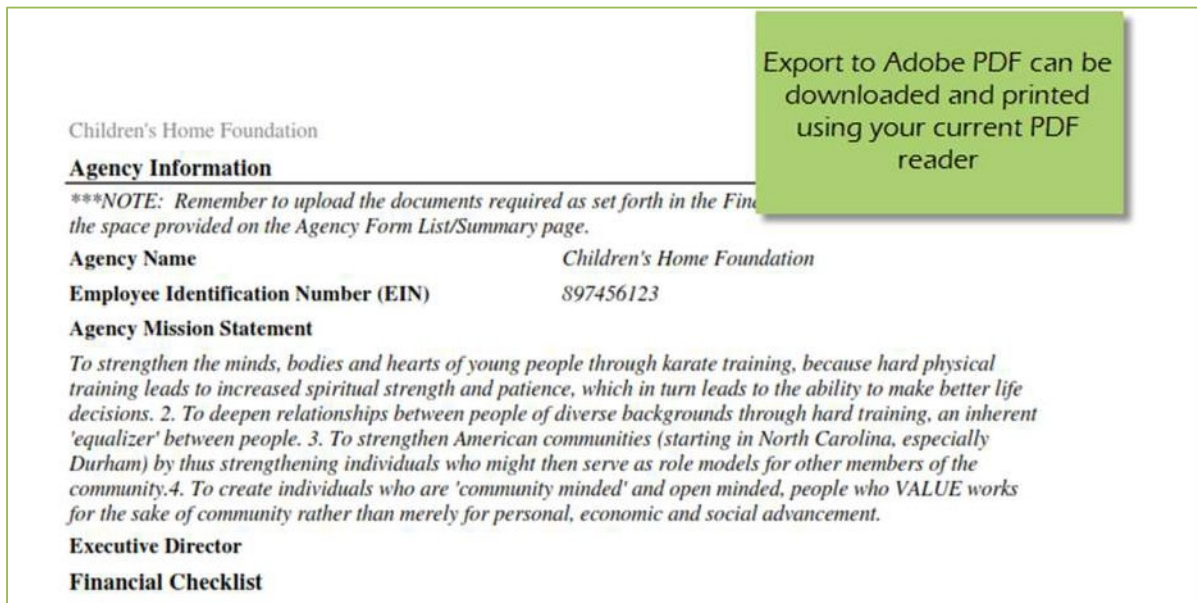
Item (* indicates Required Item)	Last Updated	Status	Action
Amy Test Agency FINAL Review	09/09/2015 2:16 PM (CST)	Submitted	
Agency Information*	Amy Watkins 02/09/2015 9:29 AM (CST)	Submitted	
Fund Raising Events Primary*	Amy Watkins 02/09/2015 12:43 PM (CST)	Submitted	

Please note: Once an application is in submitted status you will be able to view the information entered. You will not be able to make any changes to the information.

Printing Options

There are multiple options to print/export your applications:

Export to Adobe PDF - will download an Adobe PDF document into your PDF reader.



Children's Home Foundation

Agency Information

***NOTE: Remember to upload the documents required as set forth in the Financial Checklist section below in the space provided on the Agency Form List/Summary page.

Agency Name Children's Home Foundation

Employee Identification Number (EIN) 897456123

Agency Mission Statement

To strengthen the minds, bodies and hearts of young people through karate training, because hard physical training leads to increased spiritual strength and patience, which in turn leads to the ability to make better life decisions. 2. To deepen relationships between people of diverse backgrounds through hard training, an inherent 'equalizer' between people. 3. To strengthen American communities (starting in North Carolina, especially Durham) by thus strengthening individuals who might then serve as role models for other members of the community. 4. To create individuals who are 'community minded' and open minded, people who VALUE works for the sake of community rather than merely for personal, economic and social advancement.

Executive Director

Financial Checklist

Export to Adobe PDF can be downloaded and printed using your current PDF reader

Export to HTML - Opens in a new tab or browser window, and has the option to print.



Print This Page

Grant Process

Other Grant Process - 2013 Application

Children's Home Foundation

This is the Description - and this displays on the Agency Site in the Investment Process!!

Application Status: Not Started

Children's Home Foundation

Agency Information

***NOTE: Remember to upload the documents required as set forth in the Financial Checklist section below in the space provided on the Agency Form List/Summary page.

Agency Name Children's Home Foundation

Employee Identification Number (EIN) 897456123

Agency Mission Statement*

To strengthen the minds, bodies and hearts of young people through karate training, because hard physical training leads to increased spiritual strength and patience, which in turn leads to the ability to make better life decisions. 2. To deepen relationships between people of diverse backgrounds through

Export to HTML opens in a new tab on your browser

At the top of the page is the option to Print

There are also different levels you may print/export at:

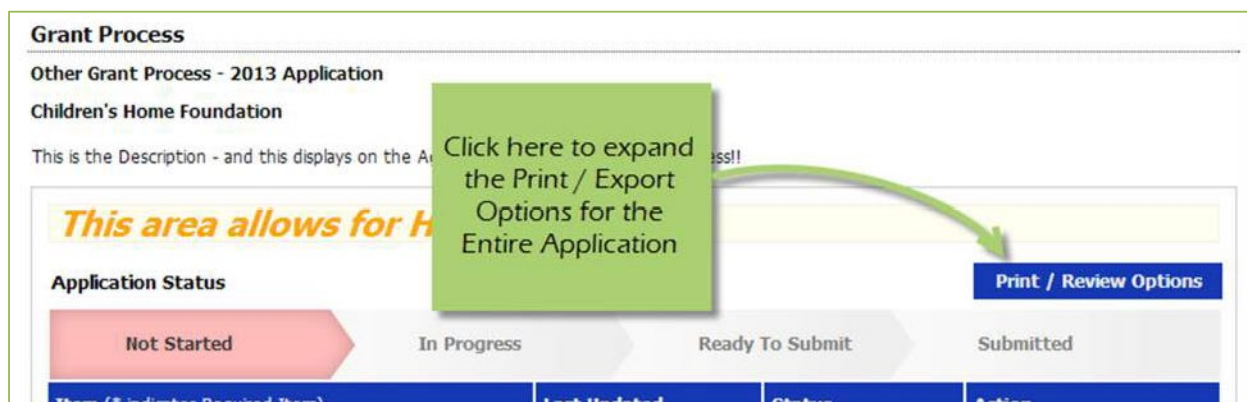
- The Entire Application - This will print or export all forms within this application.
- Agency Packet - This will print all forms that are agency specific.
- Program Packet- This will print all forms that are program specific.
- Individual Form - This will print the individual form.

The Entire Application

Step 1: Open the application by clicking on it in the left hand navigation.



Step 2: Click on 'Print/Review Options' box in the upper right hand corner of the application main page.



Step 3: Select the print/export option you would like to use, continue on to print.

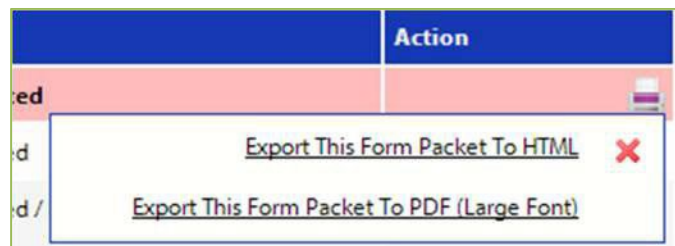


Agency Packet

Step 1: From the application main page, click on the 'Print' icon, in the agency section of the list grid under the action column.

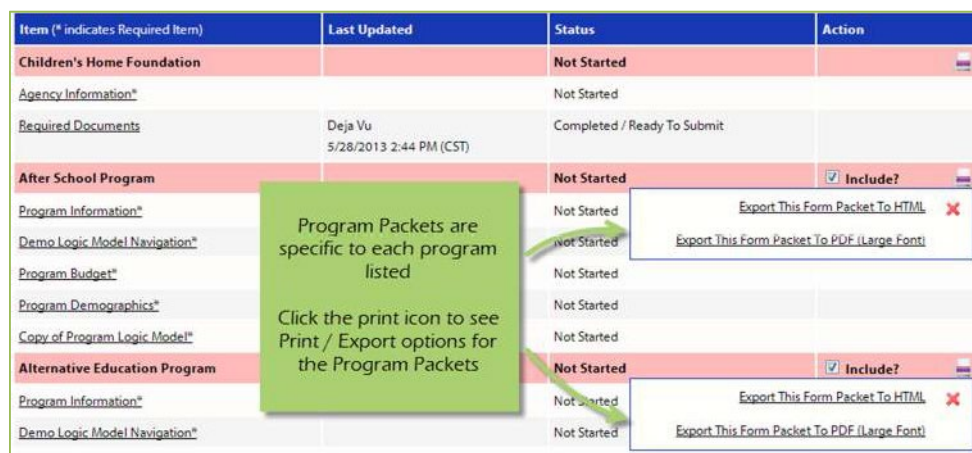


Step 2: Select the 'Print' option you would like to use, continue on to print.



Program Packet

Step 1: From the application main page, click the 'print' icon next to the desired program you would like to print. Then choose which print option to use.



Individual Forms

Step 1: From the application main page, open the form you would like to print.

Application Status **Print / Review Options**

Not Started In Progress Ready To Submit Submitted

Item (* indicates Required Item)	Last Updated		Action
Children's Home Foundation			
Agency Information*			
Required Documents	Deja Vu 5/28/2013 2:44 PM (CST)	Completed / Ready To Submit	
After School Program		Not Started	<input checked="" type="checkbox"/> Include?
Program Information*		Not Started	

Click here to open form

Step 2: In the lower right hand corner of your form are the option for printing.

Save My Work
Save My Work And Return To Prev
Save My Work and Mark as Comple
Return To Overview Page

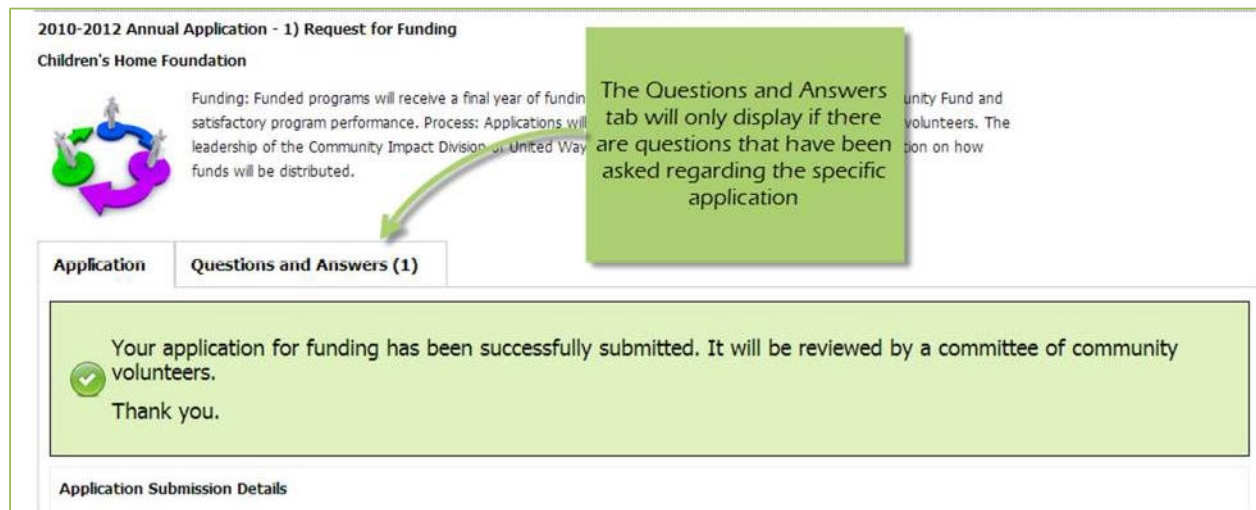
Click here to choose desired print option for the current form

Export This Form To HTML
Export This Form To Adobe PDF (Large Font)

Questions and Answers

There are two ways to access 'Questions and Answers'.

In the Application - a new tab will be added to the application if a volunteer has a question regarding that specific application.

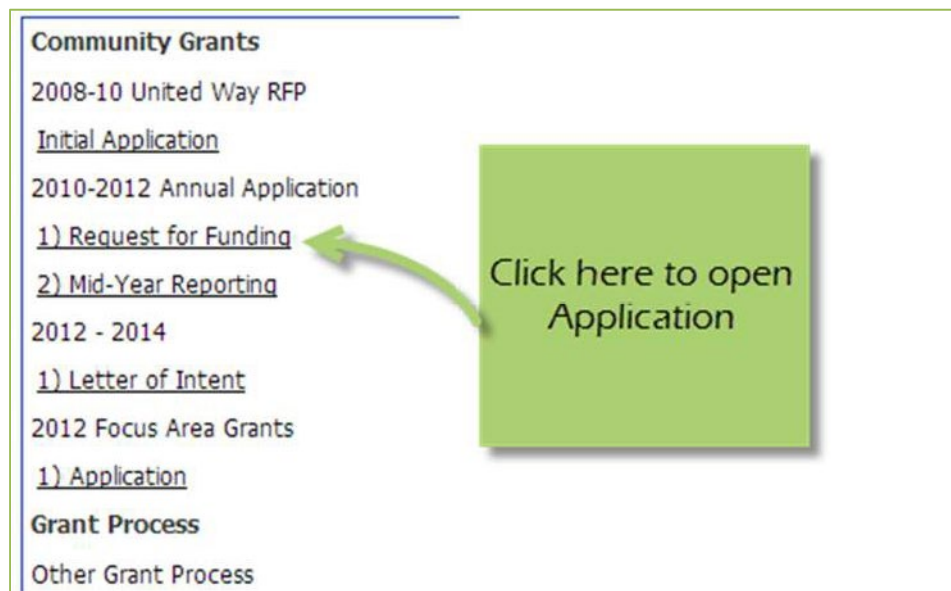


In the left hand Navigation, at the bottom of the investment/application list - All questions and answers will be listed.

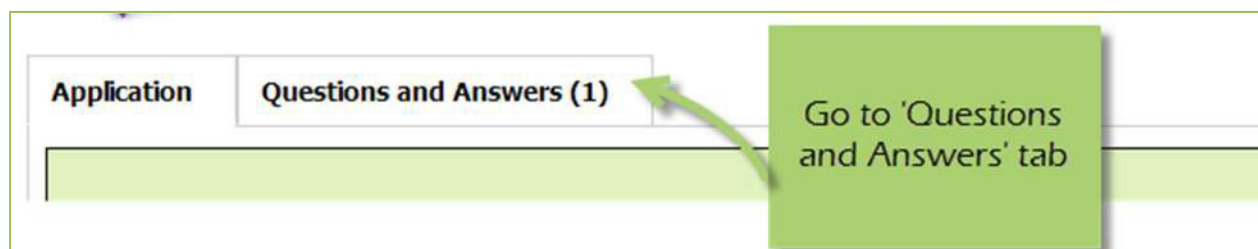


Responding to a Question - In the Application

Step 1: Open the application



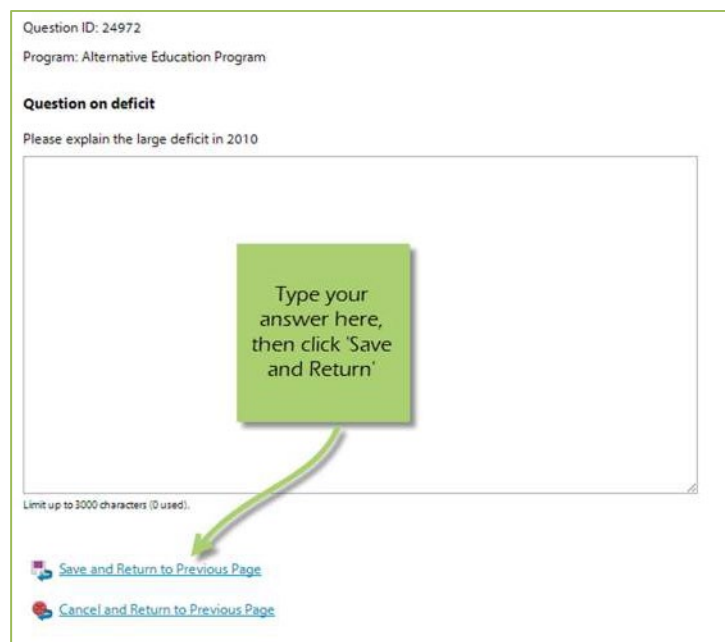
Step 2: Go to 'Questions and Answers' tab



Steps 3: Select 'Answer' for desired question



Step 4: Enter your answer to the question, then 'Save and Return to Previous Page'



Question ID: 24972
Program: Alternative Education Program

Question on deficit
Please explain the large deficit in 2010

Type your answer here, then click 'Save and Return'

Limit up to 3000 characters (0 used).

[Save and Return to Previous Page](#)
[Cancel and Return to Previous Page](#)

Once the answer is saved, it is approved by Kaitlyn Lalonde, and then displays to the volunteers reviewing your application.

Responding to a Question - From the overall 'Questions and Answers' list

Step 1: Click on 'Questions and Answers' in the left hand navigation



Request Grant Application

Community Grants
2008-10 United Way RFP
Initial Application
2010-2012 Annual Application
1) Request for Funding
2) Mid-Year Reporting
2012 - 2014
1) Letter of Intent
2012 Focus Area Grants
1) Application
Grant Process
Other Grant Process
2013 Application
Questions and Answers

Click here to see ALL questions and answers

Step 2: Click 'Respond' next to desired question

Questions and Answers

ID	Investment	Program	Question	Action
24972	Community Grants - 2010-2012 Annual Application - 1) Request for Funding	Alternative Education Program	Subject: Question on deficit Question: Please explain the large deficit in 2010 Response:	Respond

Click here to respond to the question

[Export Questions and Answers To Adobe PDF](#)

Step 3: Enter your answer to the question, then 'Save and Return to Previous Page'

Question ID: 24972
Program: Alternative Education Program

Question on deficit
Please explain the large deficit in 2010

Limit up to 3000 characters (0 used).

Type your answer here, then click 'Save and Return'

[Save and Return to Previous Page](#)
[Cancel and Return to Previous Page](#)

Print/Export-Questions and Answers

Currently this can only be done through the overall 'Questions and Answers' area

Questions and Answers

ID	Investment	Program	Question	Action
24972	Community Grants - 2010-2012 Annual Application - 1) Request for Funding	Alternative Education Program	Subject: Question on deficit Question: Please explain the large deficit in 2010 Response:	Respond

Click here to Export Questions to PDF

[Export Questions and Answers To Adobe PDF](#)

[Applications / Grant Process](#)

Please ensure you review the 2025 Application Guidelines and Supplementary Fundraising Policies document for additional information regarding process, submission timelines, mandatory reporting requirements, and evaluation criteria.

Additional questions can be directed to Kaitlyn Lalonde at:

Phone: 613-962-9531

Email: klalonde@unitedwayhpe.ca